

Options Counseling & Case Management Training



IOWA DEPARTMENT ON AGING

February 25, 2019

Optimization of Older Americans Act Services

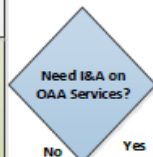
Goal: Understand the OC & CM definitions and how to implement for statewide consistency.

Aging & Disability Resource Center: Community Navigation & Coordination System

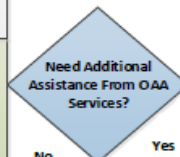
January 2019

System Access
<ul style="list-style-type: none"> * 866-468-7887 * www.lifelonglinks.org * Visits AAA * Outreach Service
Consumers
1) Individuals Age 60 or Older 2) Individuals Age 18 or Older Living With a Disability 3) Family Caregivers 4) Veterans Or Someone Calling on a Consumer's Behalf

Navigation of Supports & Services
Information & Assistance Service
<ul style="list-style-type: none"> - Caregiver Assistance (FCG) - Caregiver Assistance (ORC) - EAPA Consultation
Minimal Service Intervention Short Duration
<ul style="list-style-type: none"> * Can self advocate or arrange for supports & services * May need information and/or guidance on private and public programs and services



Coordination of Supports & Services
Options Counseling Service (0 – 90 Days)
<ul style="list-style-type: none"> - Family Caregiver - Older Relative Caregiver
Limited Service Intervention Varied Duration
<ul style="list-style-type: none"> * Have a critical, point in time need * Financial need but not eligible or don't need long-term public support * ADL and/or IADL impairment * Can address other needs on own * May be able to contribute toward cost of service * Would benefit from preventative service
Intensive Service Intervention Long Term Duration
<ul style="list-style-type: none"> * Have financial needs * ADL and/or IADL impairments * Alone or minimal caregiver support * Caregivers with high demands * Other indicators; mental health issues, food insecurity



Connect to Other Resources Within ADRC Like:	Disability Resources	Housing	Palliative Care
	Mental Health Assistance	Oral Health	Financial Management Counseling
	Veteran Assistance	Food Assistance	Other Supports & Services

Older Americans Act Services	
Adult Day / Health Services	Homemaker Service
Assisted Transportation Service	Information Services
Behavioral Health Supports	- Family Caregiver - Older Relative Caregiver
Case Management Service (90+ days)	Legal Assistance
- Assistance: Caregiver Case Management - EAPA Assessment & Intervention	Material Aid Service
Chore Service	- Supplemental Services: Family Caregiver - Supplemental Services: Older Relative Caregiver
*Congregate Nutrition	*Nutrition Counseling Service
- Family Caregiver - Older Relative Caregiver	*Nutrition Education Service
Counseling – Family Caregiver	Outreach Service
Emergency Response System	Personal Care Service
- Family Caregiver - Older Relative Caregiver	Respite Care Service
*Health Promotion: Evidence-Based	Support Groups - Caregivers
*Health Promotion: Non Evidence-Based	Training & Education
*Home Delivered Nutrition	- Training Family Caregiver - Training Older Relative Caregiver
- Family Caregiver - Older Relative Caregiver	*Transportation Service

*These services may be accessed independently without going through the system. Intake forms are still required to be completed by providers and contractors and submitted to AAAs.

Key
Mandatory Core OAA Services
Optional OAA Services
Potential Other ADRC Services

Optimization of OAA Services

■ Sellers Dorsey, Consultants

Expanding the optimal core services and target populations for Iowa's AAAs/ADRCs to most effectively meeting the needs of individuals served and ensure consistent service provision statewide.

■ IDA

Provide required training on each OAA service.

Record and place on IDA website for future reference. i.e. new employees, refresher

Available for Technical Assistance.

■ Quarterly Conversations

IDA Director and applicable staff meet with AAA Director and applicable staff to review data, discuss Area Plan goals & progress, AAA highlights and address any concerns.



OAA Service & Funding Sources

Available AAA services have been organized in the following three broad categories:

- *Information & Service Assistance*
- *Nutrition & Health Promotion*
- *Services to Promote Independence*

The organization of these three broad categories supports efforts for reporting and budgeting.



OAA Services & Funding Sources

OAA Service and Funding Sources

February 5, 2019

The grid below details by service, the allowable funding sources and whether the service is mandatory or options. In an effort to better organize offerings by AAAs, the available services have been organized in the following three broad categories:

- *Information & Service Assistance*
- *Nutrition & Health Promotion*
- *Services to Promote Independence*

The organization of these three broad categories supports efforts for reporting and budgeting.

Information & Service Assistance (Mandatory)	Nutrition & Health Promotion (Mandatory)	Services to Promote Independence (Optional)	
<ul style="list-style-type: none"> • Case Management FC Case Management ORC Case Management - Optional EAPA Assessment & Intervention • FC Counseling • Information & Assistance FC Information & Assistance ORC Information & Assistance- Optional EAPA Consultation • Legal Assistance • Options Counseling FC Options Counseling ORC Options Counseling - Optional 	<ul style="list-style-type: none"> • Congregate Nutrition FC Congregate Nutrition –Optional ORC Congregate Nutrition – Optional • Health Promotion: Evidence-Based • Health Promotion: Non Evidence-Based (Optional) • Home Delivered Nutrition FC Home Delivered Nutrition - Optional ORC Home Delivered Nutrition- Optional • Nutrition Counseling • Nutrition Education 	<ul style="list-style-type: none"> • Adult Day Care / Health • Assisted Transportation • Behavioral Health Supports • Chore • Emergency Response System FC Emergency Response System ORC Emergency Response System • Homemaker • FC Information Services ORC Information Services 	<ul style="list-style-type: none"> • Material Aid FC Supplemental Services ORC Supplemental Services • Outreach • Personal Care • FC Respite Care ORC Respite Care • FC Support Groups ORC Support Groups • Training & Education FC Training ORC Training • Transportation

Note: Older Relative Caregiver (ORC) services align with Family Caregiver (FC) services. Older Relative Caregiver services are all optional.



Options Counseling & Case Management

Allowable IDA Funding Source[s]

Information & Service Assistance

MANDATORY SERVICES	Allowable IDA Funding Source (IAFRS Funding Line)									IAFRS Service Code	Title 3B Priority service?	Registered service?	Direct Service Waiver Req'd?
	Elderly Services (110)	LifeLong Links (116)	EAPA (123)	T3B (180)	T3C1 (190)	T3C2 (200)	T3D (220)	T3E (215)	NSIP (250)				
Case Management	X			X						06	Y	Y	N
FC Case Management	X							X		CG9	N/A	Y	N
ORC Case Management - Optional	X							X		GO9	N/A	Y	N
EAPA Assessment & Intervention	X		X*	X						C08	N	Y	N
FC Counseling	X							X		CG3	N/A	Y	Y
ORC Counseling - Optional	X							X		GO3	N/A	Y	Y
Information & Assistance	X	X		X						13	Y	Y	N
FC Information & Assistance	X	X						X		CG10	N/A	Y	N
ORC Information & Assistance Optional	X							X		GO10	N/A	Y	N
EAPA Consultation	X		X*	X						C07	N	Y	N
Legal Assistance	X			X						11	Y	N	Y
Options Counseling	X	X		X						E05	N	Y	N
FC Options Counseling	X	X						X		CG8	N/A	Y	N
ORC Options Counseling - Optional	X							X		GO8	N/A	Y	N



Governing Law and Statutory Authority

OLDER AMERICANS ACT OF 1965

[Public Law 89-73]

[As Amended Through P.L. 114-144, Enacted April 19, 2016]

Older Americans Act of 1965

Iowa Code

- Title VI, Chapters 231 & 231E
- Iowa Administrative Code

State Plan on Aging

- AAA Area Plans

Reporting Manual



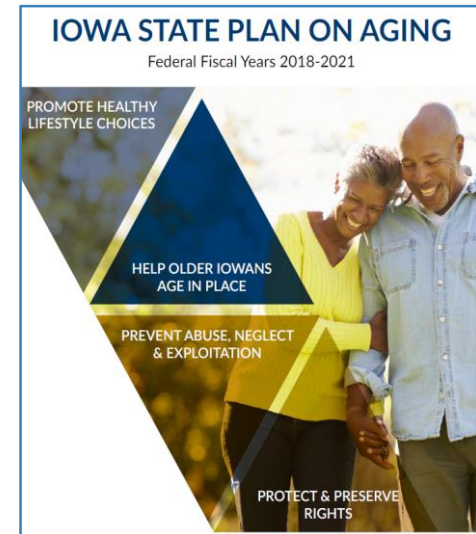
AREA AGENCIES ON AGING (AAA) REPORTING MANUAL

EFFECTIVE DATE: JULY 1, 2018

VERSION: 19-V3

ISSUE DATE: FEBRUARY 16, 2018

VERSION REVISED DATE: OCTOBER 1, 2018



Aging Consumers
Reliable database
OAA ADRC & A
disability
referrals Telephone
Lifelong Links
Person Centered
Assistance
quality
Veterans
Information
Accurate
EAPA
providers
consistency
Iowa Caregiver

Goal: *Understand the OC & CM definitions and how to implement for statewide consistency.*

Person
Centered

- Meeting consumer needs
- Supports & empowers client choice

Timely

- Identify the needs of the consumer
- Link to most appropriate service[s]

Accurate

- High data integrity
- Tell the story [legislatively, potential funders]



Services, Definitions & Unit Measures

Options Counseling – Mandatory

Subcategories:

- FC Options Counseling - Mandatory
- ORC Options Counseling - Optional

Unit Measure

Service of providing an interactive process whereby individuals receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the individual and may include others whom the individual chooses or those who are legally authorized to represent the individual. Options counseling includes the following: (1) a personal, face-to-face interview and assessment to discover strengths, values, and preference of the individual and screenings for entitlement program eligibility, (2) a facilitated decision-making process which explores resources and service options and supports the individual in weighing pros and cons, (3) developing action steps toward a goal or a long-term support plan and assistance in applying for and accessing support options, and (4) follow-up to ensure supports and decisions are assisting the individual. The Options Counseling enrollment period for a consumer shall not exceed 90 days. A consumer may have more than 1 enrollment period in a fiscal year. (Source: IDA)

Hour - Partial hour may be reported to two decimal places, e.g. 0.25 hours.



Services, Definitions & Unit Measures

FC Options Counseling - Mandatory **ORC Options Counseling - Optional**

Unit Measure

Service of providing an interactive process whereby caregivers receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the caregiver and may include others whom the individual chooses or those who are legally authorized to represent the individual. Options counseling includes the following: (1) a personal, face-to-face interview and assessment to discover strengths, values, and preference of the caregiver and screenings for entitlement program eligibility, (2) a facilitated decision-making process which explores resources and service options and supports the caregiver in weighing pros and cons, (3) developing action steps toward a goal or a long-term support plan and assistance in applying for and accessing support options, and (4) follow-up to ensure supports and decisions are assisting the caregiver.

Hour - Partial hour may be reported to two decimal places, e.g. 0.25 hours.

The Options Counseling enrollment period for a consumer shall not exceed 90 days. A consumer may have more than 1 enrollment period in a fiscal year.



Services, Definitions & Unit Measures

Case Management – Mandatory

Subcategories:

- FC Case Management
- ORC Case Management - Optional
- EAPA Assessment & Intervention

Unit Measure

A service provided to an older individual, at the direction of the older individual or a family member of the individual:

- by an individual who is trained or experienced in the case management skills that are required to deliver the services and coordination described in subparagraph; and
- to assess the needs, and to arrange, coordinate, and monitor an optimum package of services to meet the needs, of the older individual; and

Includes services and coordination such as—

- comprehensive assessment of the older individual (including the physical, psychological, and social needs of the individual);
- development and implementation of a service plan with the older individual to mobilize the formal and informal resources and services identified in the assessment to meet the needs of the older individual, including coordination of the resources and services—
 - with any other plans that exist for various formal services, such as hospital discharge plans; and
 - with the information and assistance services provided under the Older Americans Act;
- coordination and monitoring of formal and informal service delivery, including coordination and monitoring to ensure that services specified in the plan are being provided;
 - periodic reassessment and revision of the status of the older individual with—
 - the older individual; or
 - if necessary, a primary caregiver or family member of the older individual; and
 - in accordance with the wishes of the older individual, advocacy on behalf of the older individual for needed services or resources.

Hour - Partial hour may be reported to two decimal places, e.g. 0.25 hours.

(Source: OAA)



Services, Definitions & Unit Measures

FC & ORC Case Management

Family Caregiver – Mandatory

Older Relative Caregiver - Optional

A service provided to a caregiver, at the direction of the caregiver:

- by an individual who is trained or experienced in the case management skills that are required to deliver the services and coordination described in subparagraph; and
- to assess the needs, and to arrange, coordinate, and monitor an optimum package of services to meet the needs, of the caregiver; and

Includes services and coordination such as—

- comprehensive assessment of the caregiver (including the physical, psychological, and social needs of the individual);
- development and implementation of a service plan with the caregiver to mobilize the formal and informal resources and services identified in the assessment to meet the needs of the caregiver, including coordination of the resources and services—
 - with any other plans that exist for various formal services; and
 - with the information and assistance services provided under the Older Americans Act;
 - coordination and monitoring of formal and informal service delivery, including coordination and monitoring to ensure that services specified in the plan are being provided;
 - periodic reassessment and revision of the status of the caregiver; and
 - in accordance with the wishes of the caregiver, advocacy on behalf of the caregiver for needed services or resources.

(Source: OAA)



Services, Definitions & Unit Measures

EAPA Assessment & Intervention - Mandatory

Provision of service to an EAPA program consumer that is either at risk of or experiencing abuse, neglect or financial exploitation and entails: (a) One-on-one discussions identifying what is important to the person and for the person with the consideration of dignity of risk; (b) Administration of a standardized assessment tool to identify existing impairments, situations, and to balance the identified service and resource options to achieve healthier and safer outcomes; (c) Advocacy, counseling, case documentation, and person centered intervention plan that defines services and assistance to address identified needs, timelines, and providers; (d) Inter-agency case coordination and service provision; (e) Ongoing follow-up and reassessment; (f) Evaluation of outcomes; and (g) Case closure planning

(Source: IDA IAC)



Options Counseling

What it is

Interactive, decision making process

Face to Face, person-centered interview
[builds from I&A]

Includes an assessment

Up to 90 days [in majority of cases]

Unique & personalized for each individual

Planning – for the “here and now” and/or the future

Follow-up, as necessary

What it is not

Interviews over the phone

Lasts longer than 90 days

Long-term coordination of care

Providing lists

The Options Counseling Process

Person Centered: face-to-face interview; understanding consumer's strengths, values and preferences

Assessment: identifying client needs; understand nature & extent of client's situation; screenings for entitlement programs

Facilitated Decision Making: consider available resources, services or programs; assists consumer in "decisional balance"; prioritizing for point-in-time

Action Plan: identifying the steps necessary to achieve goal; simple and measurable

Follow-Up: ensure decisions are assisting the individual



Case Management

What it is

Face-to-Face, person-centered assessments that meet the needs of the consumer.

Development of a service plan based on assessed need. Coordination & quarterly monitoring of planned supportive services.

Supports & empowers client choice through advocacy.

Links individuals to the most appropriate service[s].

What it is not

Interviews over the phone

Short-term planning



EAPA Assessment & Intervention

What it is

Face-to-Face, person-centered assessment that meet the needs of the consumer.

Development of a goal-based intervention plan and follow-up dates.

Short-term coordination & monitoring of planned supportive services.

Supports & empowers client choice through advocacy.

Follow-up and evaluation of outcomes.

What it is not

Interviews over the phone

Providing lists

Long-term coordination of care

Public health issues, such as bed bugs

1,223 Consumers

Options Counseling

710 Consumers

CG & GO Options Counseling

4,111 Units

3.36 Units / Per Consumer

2,079 Units

2.92 Units / Per Consumer

\$940,617

\$228 / per unit
[Range of \$45/unit - \$491/unit]
\$769 / per consumer

\$351,312

\$128 / per unit
[Range of \$13/unit - \$696/unit]
\$246 / per consumer

487 Consumers

Case Management

3,324 Units

6.8 Units / Per Consumer

\$866,607

\$260 / per unit
\$1,779 / per consumer

222 Consumers

EAPA Assessment & Intervention

2,247 Units

10.12 Units / Per Consumer

\$336,008

\$149 / per unit
\$1,513 / per consumer



Options Counseling Performance Measures (SFY18)

IDA PERFORMANCE PLAN: RESULTS

The table below shows the measures and targets in the Iowa Department on Aging's SFY2018 Performance Plan. IDA sets SFY targets for these measures based upon AAA annual area plan projections. The actual results are based upon AAA service reporting. Note that the measures in BOLD are also in the Governor's Budget Book.

Performance Measure	FY 2018 Target	FY 2018 Actual	Target Met?
Number of older Iowans receiving at least 1 OAA nutrition, supportive, or elder rights service	50,000	48,477	N
Number of Iowans receiving information & assistance or caregiver access assistance service	10,000	19,874	Y
Percentage of Lifelong Links Callers Indicating They Received the Information They Sought	85%	98%	Y
Number of Iowans receiving Options Counseling service	1,525	1,933	Y
Percentage of Options Counseling Consumers Indicating They Received information to Make Informed Decisions about Goals/Service Needs (680 out of 710 respondents).	85%	97%	Y

Options Counseling

Performance Measures

SFY 2018: SAMS PROGRAM
PERFORMANCE MEASURES
REFERENCE GUIDE

Options Counseling

Performance Outcomes

DID YOU RECEIVE THE INFORMATION/REFERRALS NEEDED TO MAKE AN INFORMED CHOICE REGARDING GOALS/SERVICE NEED? (YES, NO, NO OPINION)

DID STAFF WORK WITH YOU TO DEVELOP A PLAN FOR WHAT TO DO NEXT? (YES, NO, NO OPINION)

Required Assessment Tool:	OC Performance Evaluation	
Required answered questions:	All Questions below	
<div>Assessment View Narrative</div> <div>Performance Evaluation</div> <div>Options Counseling</div> <div>Did you receive the information/referrals needed to make an informed choice regarding goals/service need?</div> <div><input checked="" type="radio"/> (Not Answered) <input type="radio"/> 1. Yes <input type="radio"/> 2. No <input type="radio"/> 3. Somewhat <input type="radio"/> 4. No Opinion</div> <div>Did staff work with you to develop a plan for what to do next?</div> <div><input checked="" type="radio"/> (Not Answered) <input type="radio"/> Yes <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> No Opinion</div>		
Required Service Delivery:	Options Counseling	



Case Management

Performance Measures (SFY18)

IDA PERFORMANCE PLAN: RESULTS

The table below shows the measures and targets in the Iowa Department on Aging's SFY2018 Performance Plan. IDA sets SFY targets for these measures based upon AAA annual area plan projections. The actual results are based upon AAA service reporting. Note that the measures in BOLD are also in the Governor's Budget Book.

Performance Measure	FY 2018 Target	FY 2018 Actual	Target Met?
Number of older Iowans with an independent living impairment receiving Case Management service	1,800	487	N
The percentage of Older Americans Act (OAA) funded Case Management cases closed because case management service was no longer needed (26 out of 70)	71%	37%	N
Average Number of months an OAA Case Management consumer experiencing independent living impairments is able to remain safely at home prior to transitions to a facility (101 cases with closure reason Institution).	49	11.9	N

Case Management

Performance Measures

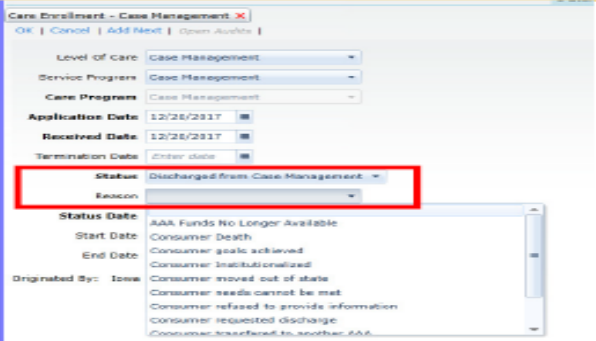
SFY 2018: SAMS PROGRAM
PERFORMANCE MEASURES
REFERENCE GUIDE

ADDITIONAL HOME & COMMUNITY BASED SERVICES

Case Management

Performance Outcomes

PERCENTAGE OF CASE MANAGEMENT CASES CLOSED BECAUSE CASE MANAGEMENT SERVICE WAS NO LONGER NEEDED.

Required Care Enrollment:	Case Management	
Required Care Enrollment Information:	Status/Reason	
		
Required Service Delivery:	Case Management	

Case Management

Performance Measures

SFY 2018: SAMS PROGRAM
PERFORMANCE MEASURES
REFERENCE GUIDE

AVERAGE NUMBER OF MONTHS A CASE MANAGEMENT CONSUMER EXPERIENCING INDEPENDENT LIVING IMPAIRMENTS IS ABLE TO REMAIN SAFELY AT HOME PRIOR TO TRANSITIONING TO FACILITY.

Required Care Enrollment:	Case Management	
Required Care Enrollment Information:	Status/Start Date/End Date	

Case Enrollment - Case Management

OK | Cancel | Add Note | Open Audit

Level Of Care: Case Management

Service Program: Case Management

Care Program: Case Management

Application Date: 12/21/2017

Received Date: 12/21/2017

Termination Date: Enter date

Status: Discharged from Case Management

Reason:

Status Date: 12/21/2017

Start Date: 12/21/2017

End Date: 12/21/2017

Originated By: Sowa Creator: Dick Harmon

Required Service Delivery:	Case Management	
----------------------------	-----------------	--



EAPA Assessment & Intervention

Performance Measures (SFY18)

SFY 2018: SAMS PROGRAM
PERFORMANCE MEASURES
REFERENCE GUIDE

EAPA Performance

Performance Outcomes

PERCENTAGE OF EAPA ASSESSMENT & INTERVENTION CONSUMER CASES CLOSED WITH EAPA SERVICES NO LONGER NEEDED

Required Care Enrollment:	EAPA Discharged	
Required Care Enrollment Information:	Status/Reason	
<div><div>Care Enrollment - EAPA Discharged ✕</div><div>OK Cancel Reject Changes Open Audits </div><div><div>Level Of Care: Elder Abuse Prevention and Awareness ▾</div><div>Service Program: EAPA Discharged ▾</div><div>Care Program: EAPA Discharged ▾</div><div>Application Date: 12/8/2017 📅</div><div>Received Date: 12/8/2017 📅</div><div>Termination Date: Enter date 📅</div><div><div>Status: EAPA Discharged ▾</div><div>Reason: Services no longer needed/abuse issues resolved ▾</div></div><div>Status Date: 12/8/2017 📅</div><div>Start Date: 12/8/2017 📅</div><div>End Date: 12/8/2017 📅</div></div></div>		
Required Service Delivery:	EAPA Assessment & Intervention	



Service Planning & Evaluation

SFY18

Purpose:

- Analysis
- Planning
- Service Delivery Strategies
- Reporting
- Targeting [OAA]
 - Greatest Economic
 - Greatest Social Need
 - At Risk for Institutional Placement
 - Frail



Iowa Department on Aging
510 E 12th Street, Ste. 2
Des Moines, IA 50319
515.275.3353 | 800.532.3213
www.iowaging.gov

AGING & DISABILITY NETWORK CONSUMER INTAKE FORM

The service you are receiving is paid for entirely or partially by funds from the federal Older American's Act and the State of Iowa. Your responses on this form are confidential. The Department on Aging uses this information to comply with reporting requirements and research the needs of older Iowans. Thank you.

Today's Date: First Name: MI: Last Name:

Date of Birth: or Age:

Address: City: State: Zip:

Home Phone: Cell Phone: Email:

Do you live alone? ☐ Yes ☐ No Number in Household:

Please Check Your Annual Total Household Income Range:

<input type="checkbox"/> \$0 - \$12,140	<input type="checkbox"/> \$12,141 - \$16,460	<input type="checkbox"/> \$16,461 - \$20,780
<input type="checkbox"/> \$20,781 - \$25,100	<input type="checkbox"/> \$25,101 - \$29,420	<input type="checkbox"/> \$29,421 - \$33,740
<input type="checkbox"/> \$33,741 - \$38,060	<input type="checkbox"/> \$38,061 - \$42,380	<input type="checkbox"/> \$42,381 - or Above

Veteran Status: ☐ Not a Veteran ☐ Veteran ☐ Veteran Spouse/Dependent

Gender: ☐ Female ☐ Male ☐ Transgender

Race: ☐ White ☐ American Indian/Alaskan Native ☐ Asian ☐ African American/Black
☐ Native Hawaiian/Other Pacific Islander ☐ Other

Ethnicity: ☐ Hispanic or Latino ☐ Not Hispanic or Latino

Primary Language: ☐ English ☐ Other:

Does Medicaid pay for some of the services you receive in your home, such as homemaker, transportation, organizing your medications, bathing assistance, or meals?
☐ Yes ☐ No ☐ Don't Know

In the past 30 days, how often were these statements true:

I have worried whether my food would run out before I got money to buy more (check one).
☐ Often ☐ Sometimes ☐ Never

The food that I bought just didn't last and I didn't have money to get more (check one).
☐ Often ☐ Sometimes ☐ Never



IOWA DEPARTMENT ON AGING

Frequently Asked Questions

What activities occur during Options Counseling?

A person centered, face-to-face interview; assessment; screening national/state/local entitlement programs; facilitated decision making to identify goal[s]; developing action steps; follow-along for up to 90 days.

Can Options Counseling be done on the telephone?

No, a face to face interview **and** assessment is required for Options Counseling. If no face-to-face visit is conducted, it should be counted as I&A. If the consumer does not want AAA staff in their home, meeting at a different location such as AAA office, public library, or a mutually agreed upon spot is an alternative.

Do staff need to be AIRS certified in order to enter I&A units prior to an OC visit?

No, currently the only requirement for AIRS certification is for Family Caregiver Specialists.

Frequently Asked Questions

Please clarify how to accurately document an Options Counseling.

The service of Options Counseling requires both a face-to-face visit and completing an assessment. If both these do not occur, it is not Options Counseling and should not be recorded as such. Failed Options Counseling visits should be the exception, rather than the norm. A best practice would be to call the consumer ahead of time in an attempt to ensure a face-to-face meeting.

Scenario: The Options Counselor confirms the appointment and travels to client's home. The client refuses the home visit or after some discussion does not want Options Counseling. The Options Counselor should record the prep/planning and travel activities as a unit of I&A.

Scenario: The Options Counselor confirms the appointment and travels to client's home. However, the individual was not home at the time of scheduled visit. The client calls the Options Counselor and reschedules the appointment for two days later. The face-to-face visit occurs and assessment is completed. Record all the time for the activities (prep/planning, travel, visit, documentation] as Options Counseling service delivery.

Frequently Asked Questions

At what point does an Information & Assistance become Options Counseling or EAPA Consultation become EAPA Assessment & Intervention?

Both Options Counseling and EAPA Assessment & Intervention begin when a face-to-face visit occurs **and** the appropriate assessment is conducted. EAPA consultation is a subcategory of I&A. Likewise, EAPA Assessment & Intervention is a sub-category of case management. If a visit does not result in a face-to-face assessment, the activity is EAPA Consultation. Likewise, if the visit does result in a face-to-face assessment and intervention plan, the activity is EAPA Assessment & Intervention.

At what point does Options Counseling become Case Management?

Options Counseling is a short-term (90 days or less) transitional service to assist consumers in setting up a support plan. Case Management is a long-term (90 days or more) coordination and monitoring of support services. If a situation appears to be complex and support will be needed for more than 90 days, the service of Case Management is to be used.

Frequently Asked Questions

Do Performance Measures for Options Counseling also apply to Family Caregiver Options Counseling?

Yes. It is the responsibility of the OC/Family Caregiver Specialist to complete the necessary fields in WellSky.

Will there be a more applicable assessment for Caregivers?

Yes. The Family Caregiver Program will see enhancements during this calendar year.

Where can we find this presentation?

This and all service definition trainings will be placed on the IDA Website, under the AAA tab for future reference and training purposes (<https://www.iowaaging.gov/area-agencies-aging/area-agency-aging-professionals>). You can direct any additional questions to Julie.bergeson@iowa.gov

Do all OC consumers receive an action plan?

Yes.

Frequently Asked Questions

**Do the same Rules [Chapter 21] apply to FCG Case Management.
Will FCG Case Management follow the same rules as “regular” Case
Management? And Performance Measures.**

Yes. Administrative Rules will be updated later in 2019 and at the conclusion of the FCG Project.

**Is there a requirement for how many ADLs a Consumer must have before
receiving the service of Case Management?**

The definition for case management does not require 2+ ADLS for the service to be provided. The requirement for 2+ ADLS was used when determining level of care for the Elderly Waiver. IDA purposely broadened the definition to better meet the needs of our population. Also, there is no requirement in Chapter 21: *The Service of Case Management*, that requires an individual receive two or more HCBS services. Services provided should match client needs based on the assessment.

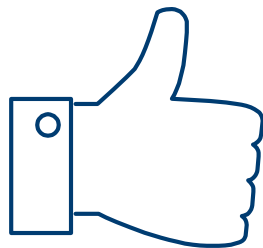
Frequently Asked Questions

How do we document service delivery time?

The services of Options Counseling, Case Management and EAPA Assessment & Intervention have an hour unit measure. Staff may record time as a partial hour to two decimal places in 15 minute increments (e.g. 0.25 = 15 min; 0.5 = 30 mins; 0.75 = 45 mins; 1.00 = 60 mins). Unit measure details are outlined in the Services, Definitions and Unit Measures section of the Reporting Manual.

How do we document staff time in Wellsky?

This training is designed to provide information on Services, Definitions, and Unit Measure and the tracking and recording units for service delivery. IDA does not have a policy regarding the tracking and recording of activities and time not associated with units of service delivery. For issues related to Wellsky, please continue to work with the AAA System Administrator.



THANKS!

Any questions?

Contact Julie Bergeson
(515) 725-3332 or julie.bergeson@iowa.gov